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Approved by:

Frank J. Piason

U.S. Embassy

Prepared by:

Marie-Cécile Hénard

Report Highlights:

The French oilseed harvest in 2001 is being hurt by abnormally wet weather conditions. Production in 2001 is expected to include 3.1 million MT of rapeseed, 1.8 million MT of sunflowerseed and 280,000 MT of soybeans. In MY 2000/01, French rapeseed exports to third countries (mainly China) declined in the face of competition from Canadian and Australian canola. French imports of soybeans in the first half of MY 2000/01 increased significantly to replace meat and bone meals in animal feed. Brazil greatly benefitted from the increased French demand for soybeans, while shipments from the United States have remained relatively stable. However, French imports of soybean meal from the United States have increased sharply, although remaining minor compared with shipments from Argentina and Brazil.

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Includes Trade Matrix: Yes
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Executive Summary

The French oilseed harvest in 2001 is being hurt by abnormally wet weather conditions. Production in 2001 is expected to include 3.1 million MT of rapeseed, 1.8 million MT of sunflowerseed and 280,000 MT of soybeans. In MY 2000/01, French rapeseed exports to third countries (mainly China) declined in the face of competition from Canadian and Australian canola. French imports of soybeans in the first half of MY 2000/01 increased significantly to replace meat and bone meals in animal feed. Brazil greatly benefitted from the increased French demand for soybeans, while shipments from the United States have remained relatively stable. However, French imports of soybean meal from the United States have increased sharply, although remaining minor compared with shipments from Argentina and Brazil.

Section I: Situation Outlook

Production

French estimates of 2001 rapeseed harvest are revised down to 3.1 million MT as a result of lower yields than expected. Harvest is ongoing and has been delayed by several weeks as a result of the abnormally wet weather across France in the past few weeks. 2001 is the second year of declining rapeseed production resulting from adverse weather conditions. French sunflowerseed production in 2001 is unchanged from former estimates at 1.8 million MT, due to the combination of increased acreage and lower yields. Sunflowerseed plantings increased in 2001 to make up for the reduced acreage under rapeseed and grains, which were sown with difficulty, due to wet weather conditions. Also, sunflowerseed yields are expected to be affected by unusually heavy rains in July. Finally, French soybean production in 2001 is revised slightly down to 280,000 MT, which is marginal compared to rapeseed and sunflowerseed production, but which is still a significant increase over 2000. The increase is largely the result of a growing area planted to traced non-GMO soybeans under the "Soja de Pays" program (see FR1032, dated 06/01/01 for more details).

Trade

Rapeseed and Sunflowerseed

The following trade matrices were prepared with the most recent trade data available from the French Customs and ONIOL (French oilseeds interprofessional organization). Trade matrices from rapeseed and sunflowerseed are on a 10 month-basis, i.e., from July to April, which gives an almost complete picture of marketing years 1999/00 and 2000/01.

French rapeseed exports are expected to decline significantly from MY 1999/00 to MY 2000/01, as a result of reduced domestic production. French rapeseed shipments declined by 37 percent from July-April 99/00 to July-April 00/01, due mainly to reduced exports to third countries, i.e., China, Pakistan, Bangladesh and Mexico. French rapeseed exports were hurt by the comparative price-competitiveness of canola produced in Canada and Australia on the world market, which took over France's market share for rapeseed, principally in China.

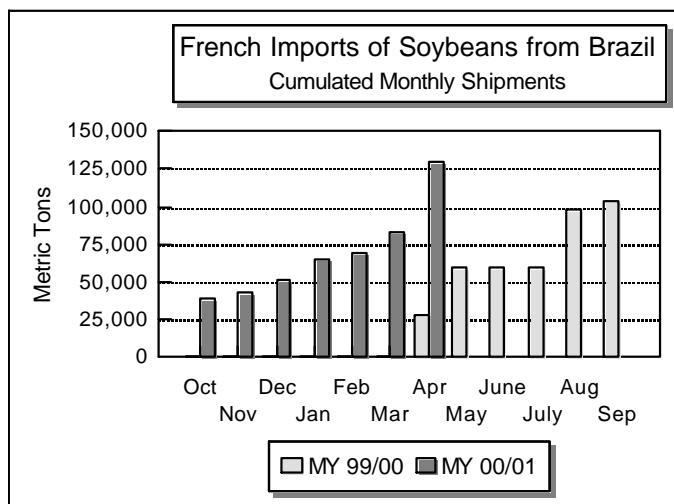
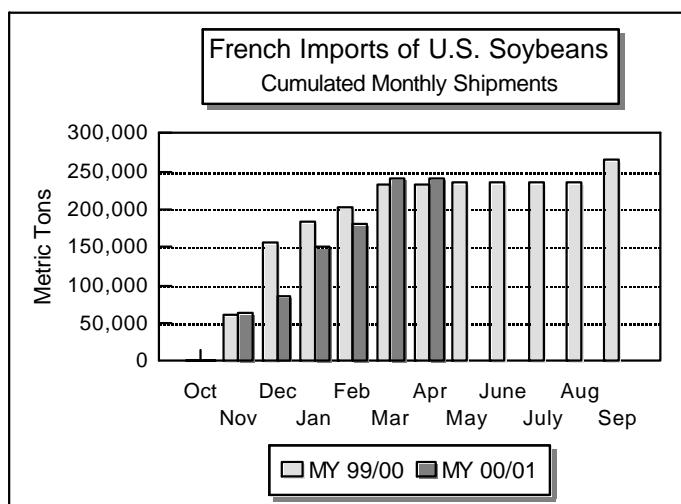
Similarly, the decline in French sunflowerseed supply from MY 1999/2000 to MY 2000/2001 reduced exports and increased imports in 2000/01. During the first 10 months of MY 2000/01, French sunflowerseed exports decreased by 11 percent, due mainly to reduced shipments to Belgium, and despite increased exports to Morocco. The trade matrix in the following pages indicates that French imports of sunflowerseed from the Black Sea area (Ukraine and Russia) increased significantly during the first 10 months of MY 2000/01, resulting in an increase in total imports. Imports from Russia and Ukraine increased significantly in February and March 2001, in anticipation to the export taxes on sunflowerseed announced by the Governments of these countries.

Soybeans

Given that the last trade estimates are for April 2001 and the soybean MY starts in October, data are available for the first 6 months of MY 2000/01 for soybeans.

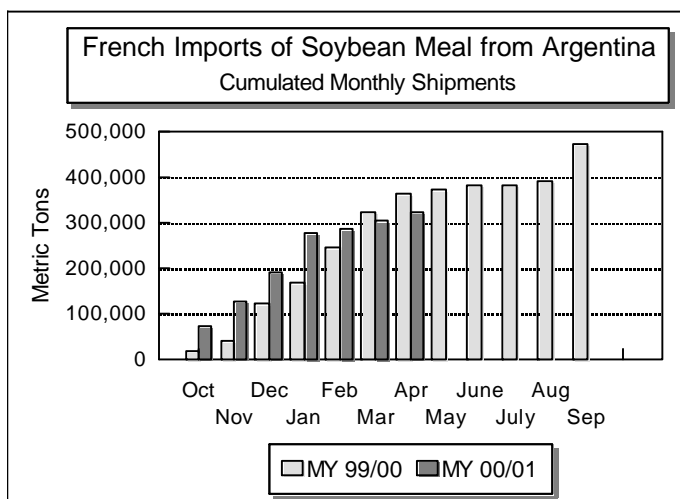
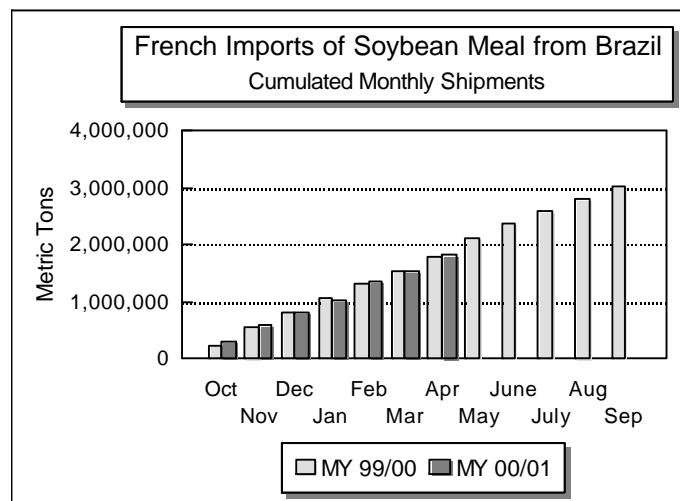
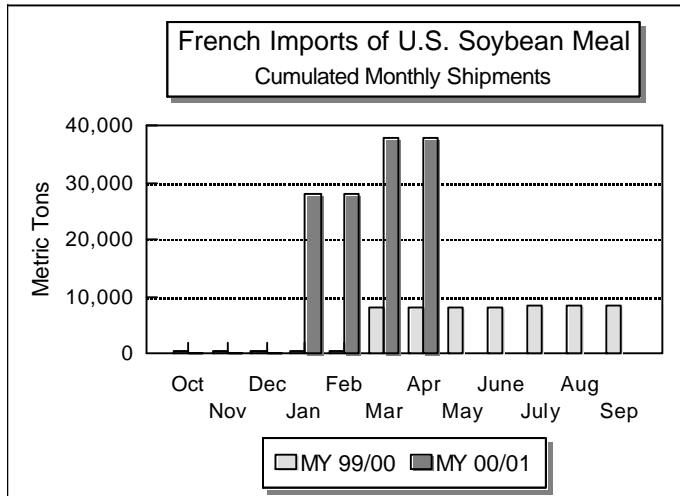
French imports of soybeans are expected to increase by 13 percent to 530,000 MT in MY 2000/01, as a result of the increased demand by the French feed industry. In fact, meat and bone meals have been banned from all animal feed since November 2000 and the best replacement for MBM is soybean meals, which are either processed from imported soybeans or directly imported. During the first 6 months of MY 2000/01, French imports of soybeans increased by almost 100,000 MT. The U.S. benefitted marginally from the French growing demand for soybeans, increasing exports by 5,000 MT, while Brazil increased its shipments of soybeans to France by more than 102,000 MT.

As indicated in the graphs below, the pace of Brazilian exports of soybeans to France has changed significantly in 2000/01 to complement U.S. supply on the French market.



Interestingly, French imports of soybean meal slightly declined in the first half of MY 2000/01, due to reduced shipments from Argentina and Belgium (the latter being transshipments from third countries), and despite growing imports from Brazil and the United States. French imports of soybean meal from the United States were estimated by ONIOL to have boomed in the first 6 months of MY 2000/01, but remained minor compared to shipments from Argentina and Brazil.

The graphs below indicate that France's imports from Brazil and Argentina, its leading suppliers of soybean meals, arrived at the same pace in 2000/01 as in 1999/00, while imports from the United States boomed in January 2001.



Section II: Statistical Tables

Rapeseed

PSD Table						
Country	France					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	1343	1343	1235	1225	1113	1100
Area Harvested	1343	1343	1235	1225	1100	1100
Beginning Stocks	110	110	85	85	60	156
Production	4454	4454	3590	3569	3500	3100
MY Imports	47	46	35	28	35	30
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	19	19	18	15	18	15
TOTAL SUPPLY	4611	4610	3710	3682	3595	3286
MY Exports	2781	2767	2100	1785	1980	1600
MY Exp. to the EC	1641	1641	1700	1460	1700	1300
Crush Dom. Consumption	1400	1403	1250	1288	1250	1100
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	345	355	300	453	300	486
TOTAL Dom. Consumption	1745	1758	1550	1741	1550	1586
Ending Stocks	85	85	60	156	65	100
TOTAL DISTRIBUTION	4611	4610	3710	3682	3595	3286
Calendar Year Imports	28	25	30	30	35	30
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	2231	2241	2100	1700	2000	1700
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Rapeseed		
Time period	July-April	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Germany	604004	Germany	701051
Belgium	497749	Belgium	414191
China	505893	China	160741
Pakistan	322239	UK	78718
Netherlands	180107	Bangladesh	66508
Bangladesh	141488	Netherlands	43161
Mexico	56813	Pakistan	37914
India	44125	India	25100
UK	26750	Morocco	4889
Japan	23100		
Total for Others	2402268		1532273
Others not Listed	21722		5061
Grand Total	2423990		1537334

Sources: ONIOL, French Customs

Sunflowerseed

PSD Table						
Country	France					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	817	817	737	710	800	760
Area Harvested	817	817	737	710	800	760
Beginning Stocks	161	202	277	342	209	347
Production	1919	1919	1873	1813	1800	1800
MY Imports	139	127	120	170	110	180
MY Imp. from U.S.	13	13	15	15	15	15
MY Imp. from the EC	4	4	5	10	5	5
TOTAL SUPPLY	2219	2248	2270	2325	2119	2327
MY Exports	490	453	525	420	525	400
MY Exp. to the EC	475	441	500	400	500	380
Crush Dom. Consumption	1240	1241	1325	1378	1290	1390
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	212	212	211	180	140	190
TOTAL Dom. Consumption	1452	1453	1536	1558	1430	1580
Ending Stocks	277	342	209	347	164	347
TOTAL DISTRIBUTION	2219	2248	2270	2325	2119	2327
Calendar Year Imports	93	86	130	150	110	150
Calendar Yr Imp. U.S.	15	15	15	15	15	15
Calendar Year Exports	527	509	525	450	480	400
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Sunflowerseed		
Time period	July-April	Units:	MT
Exports for:	1999		2000
U.S.	25	U.S.	236
Others		Others	
Spain	129884	Spain	129244
Belgium	113272	Belgium	71101
Germany	66811	Germany	50436
Netherlands	25839	Netherlands	30726
Switzerland	3870	Morocco	13503
UK	2477	Portugal	5117
		UK	3246
		Switzerland	1539
Total for Others	342153		304912
Others not Listed	3296		2072
Grand Total	345474		307220

Sources: ONIOL, French Customs

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Sunflowerseed		
Time period	July-April	Units:	MT
Imports for:	1999		2000
U.S.	14829	U.S.	1106
Others		Others	
Romania	63123	Russia/Ukraine	143296
Bulgaria	21740	Romania	9393
Russia	12681	Netherlands	3052
Ukraine	11700	Spain	1586
Italy	2417	Italy	1373
Netherlands	2295	Hungary	1136
Hungary	1667	Belgium	1088
Germany	1553		
Belgium	1282		
Total for Others	118458		160924
Others not Listed	4635		3109
Grand Total	137922		165139

Sources: ONIOL, French Customs

Note: ONIOL published joint Russia/Ukraine import data for MY 2000/01 as trade from these countries is tightly inter connected.

Soybeans

PSD Table						
Country	France					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Area Planted	102	102	79	79	120	110
Area Harvested	102	102	79	79	120	110
Beginning Stocks	16	16	36	36	36	23
Production	267	267	208	208	310	280
MY Imports	467	467	550	530	600	550
MY Imp. from U.S.	265	265	280	270	250	270
MY Imp. from the EC	51	51	60	65	50	70
TOTAL SUPPLY	750	750	794	774	946	853
MY Exports	25	11	20	6	20	5
MY Exp. to the EC	25	11	20	6	20	5
Crush Dom. Consumption	330	329	350	355	480	400
Food Use Dom. Consump.	30	30	30	30	30	35
Feed,Seed,Waste Dm.Cn.	329	344	358	360	370	390
TOTAL Dom. Consumption	689	703	738	745	880	825
Ending Stocks	36	36	36	23	46	23
TOTAL DISTRIBUTION	750	750	794	774	946	853
Calendar Year Imports	441	439	550	530	600	530
Calendar Yr Imp. U.S.	194	194	200	270	250	270
Calendar Year Exports	20	8	20	6	20	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Soybean		
Time period	Oct-April	Units:	MT
Imports for:	1999		2000
U.S.	234213	U.S.	239849
Others		Others	
Brazil	27408	Brazil	129438
Paraguay	22016	Belgium	36131
Canada	18497	Netherlands	14163
Netherlands	12532	Spain	3054
Belgium	9566	Panama	2700
Spain	3538	Italy	2270
Italy	1202	Germany	1584
		China	1061
Total for Others	94759		190401
Others not Listed	1756		2242
Grand Total	330728		432492

Sources: ONIOL, French Customs

Import Trade Matrix			
Country	France		
Commodity	Meal, Soybean		
Time period	Oct-April	Units:	MT
Imports for:	1999		2000
U.S.	7964	U.S.	37897
Others		Others	
Brazil	1782685	Brazil	1833658
Argentina	364636	Argentina	322893
Belgium	270121	Belgium	202350
Total for Others	2417442		2358901
Others not Listed	224524		217222
Grand Total	2649930		2614020

Sources: ONIOL, French Customs